

Message Text

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73

ACTION AGR-20

INFO OCT-01 EUR-25 ISO-00 EB-11 COME-00 SWF-02 TRSE-00

CIAE-00 INR-11 NSAE-00 RSC-01 DRC-01 /072 W

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R 061752Z AUG 74

FM AMEMBASSY BONN

TO SECSTATE WASHDC 4243

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PASS AGRICULTURE FOR OILSEEDS & PRODUCTS, FCA

E.O. 11652: N/A

TAGS: EAGR, GW

SUBJECT: GERMAN SOYBEAN IMPORTS

REF: STATE 167850

1. OFFICIAL STATISTICS FOR OCTOBER-MAY AND INDUSTRY
OPINION INDICATE FOLLOWING SOYBEAN AND MEAL BALANCE
FOR 1973/74 (IN 1,000 MT):

ITEM	BEANS	MEAL
PRODUCTION	--	2,550
IMPORTS	3,250	600
TOTAL	3,250	3,150
EXPORTS	20	1,150
USE	3,230	2,000

2. FORECAST 1974/75 (1,000 MT):

SOYBEANS SOYBEAN MEAL

A. NO PRICE CHANGE	3,300	550
B. 15 PERCENT PRICE INCREASE	3,300	550
C. 30 PERCENT PRICE INCREASE	3,200	500

THE FORECAST IS BASED ON THE FOLLOWING ASSUMPTIONS CONFIRMED IN DISCREET DISCUSSIONS WITH TRADE AND INDUSTRY:

A. LATEST CENSUS RESULTS INDICATE NO SUBSTANTIAL CHANGES IN ANIMAL PRODUCTION. PRICES OF ANIMAL PRODUCTS

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WILL NOT FALL BELOW DEPRESSED 1973-74 LEVELS.

B. SBM PRICE INCREASES UP TO 30 PERCENT WOULD NOT RESULT IN SIGNIFICANT SHORT-TERM REDUCTION OF LIVESTOCK AND POULTRY NUMBERS.

C. WITH 30 PERCENT SBM PRICE INCREASE, FEED COMPTCZSSLYF# WILL LOOK FOR SUBSTITUTES, BUT IT IS REGARDED UNLIKELY

THAT THEY WILL FIND CHEAPER MATERIAL - PARTLY BECAUSE PRICES OF COMPETING MEALS WILL FOLLOW SBM PRICE RISE.

D. THERE IS LITTLE "LUXURY" CONSUMPTION OF SBM. THE PRICE OF PROTEIN MEAL IN THE CURRENT YEAR 1973/74 HAS BEEN RELATIVELY HIGH AND THE SUBSTITUTION POSSIBLE HAS ALREADY BEEN MADE BY REDUCTION IN PROTEIN "SAFETY MARGINS". OFFICIAL STATISTICS SHOW REDUCED CONSUMPTION FOR OCT.-APRIL:

	1972/73	1973/74
	1,000 MT	1,000 MT
OILSEED MEALS, TOTAL	2,884	2,366
SBM	1,317	1,114

E. ABOUT 50 PERCENT OF THE SOYBEAN MEAL IS PURCHASED BY FARMERS IN BULK. FARMERS HAVE BECOME VERY PRICE CONSCIOUS. ON PRICE ASSUMPTION C, IT IS CONCEIVABLE THAT A FEW MIGHT TEMPORARILY REDUCE PROTEIN FEEDING, EVEN THOUGH IT WOULD PROBABLY REDUCE THEIR PROFITS.
HILLENBRAND

NOTE BY OC/T: # AS RECEIVED.

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